

Section 1.2 Cover sheet Key project information

Anne McCauley
05/28/04 02:21 PM

To: kevinb@skokomish.org
cc: Susan Morales/R10/USEPA/US@EPA, keith@skokomish.org
Subject: RE: Skokomish Tribe Brownfields Assessment Grant

Kevin -

Thanks for letting me know about the upcoming change in the Tribe's point of contact. As you are nearing getting a scope of work out to the bidding community for the assessment work and because I am new to the grant and the Tribe will soon have a new POC, a face-to-face meeting in which we can discuss federal requirements under the grant and work out any issues would be timely. It would be most helpful if your successor could also join us. Please let me know your availability in the next few weeks and Susan Morales and I will drive over for a couple of hours.

Prior to meeting, I will put together a list of those items that we generally make a point of discussing with grantees at an early-in-the-grant meeting. We will try to make the meeting as helpful to you and your financial folks as possible to ensure that we're all meeting the requirements imposed by the grant.

It looks as though we haven't shared with you an example quarterly report to use as template so please find attached a WordPerfect document with the example format. You do not have to use this format but it does ensure that all the quarterly reporting elements are included. I'm sorry that we didn't send the example to you earlier.

Give me a call if you have any questions. Regards -

sample assessment quarterly report 5-28-04.wpd

Anne McCauley
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----- Forwarded by Anne McCauley/R10/USEPA/US on 05/28/04 01:37 PM -----



Kevin Bourgaault
<kevinb@skokomish.org>

05/21/04 08:45 AM

To: Mccauley.Ann@epamail.epa.gov
cc:
Subject: RE: Skokomish Tribe Assessment Grant Quarterly Reports

Ms. McCauley,

I am the primary point of contact for the Brownfields Assessment Grant. I will be leaving my position at the Skokomish Indian Tribe in the end of June and will most likely be shifting reporting and assessment management duties to Keith Dublanica, Skokomish Director of Natural Resources. I will provide you contact information for the future point of contact when I things become formalized. Until then, please feel free to contact me about this grant and activities as usual.

Kevin Bourgaault

Skokomish Economic Development Planner

-----Original Message-----

From: Mccauley.Ann@epamail.epa.gov [mailto:Mccauley.Ann@epamail.epa.gov]
Sent: Wednesday, May 05, 2004 4:51 PM
To: kevinb@skokomish.org
Cc: Morales.Susan@epamail.epa.gov
Subject: Skokomish Tribe Assessment Grant Quarterly Reports

Mr. Bourgault -

As Susan Morales has already mentioned to you, I will be working with you as EPA's Project Officer on the Assessment Grant that the Skokomish Tribe was awarded last year. I am in the process of becoming familiar with your project through the workplan, the application and the two Quarterly Reports that Carolyn LePage sent out earlier this week and wanted to touch base with you. My understanding is that you the primary point of contact for the Tribe for work relative to the Assessment Grant. Is that correct?

As I am new to the Brownfields Program, Susan will continue to be available to both you and me to answer questions and provide her expertise.

The description of activities completed to date in the two Quarterly Reports were really helpful and appreciated. However, no summary of quarterly expenditures was included and I wonder if we've provided you an example Quarterly Report to use as a guide?

And just a reminder: the Grant Terms and Conditions require that prior to sample collection using Grant funds, a Quality Assurance Project Plan (QAPP) must be reviewed and approved by EPA. If you have questions regarding this requirement, please give me a call at the number listed below.

Susan and I would like to provide whatever assistance and guidance we can to help you both successfully complete the assessment project and meet the requirements of the Grant. We would be happy to travel to your offices to meet with you and/or other folks working on the Grant. Please let me know if a meeting would be helpful and I will make arrangements.

Regards -

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Brownfields Assessment Cooperative Agreement Example Quarterly Report Outline

The Quarterly Report is to be provided to the EPA Brownfields Project Officer. Electronic copies of the report and any attachments may be acceptable. Please check with the EPA Project Officer to verify if this is an agreeable option.

COVER LETTER

- **Grantee Name and Cooperative Agreement Number:**
- **Start Date and End Date:** Provide the official project start and end dates. Remember to update these dates if the grant is modified.
- **Quarterly report number:** Corresponding to the number of quarters since the cooperative agreement award was made.
- **Date submitted:** Quarterly Reports are due to be submitted within 30 days of the close of each Federal fiscal quarter.
- **Federal fiscal quarter(s) covered by report:** Use Federal fiscal quarters (i.e., Oct 1 - Dec 31, 2003 = Quarter 1, 2004; Jan 1 - Mar 31, 2004 = Quarter 2, 2004; April 1 - June 30, 2004 = Quarter 3, 2004; July 1 - Sept 31, 2004 = Quarter 4, 2004).
- **Prepared by:** Give the name, office/department, address, email and phone number of the person who prepared this report.
- **Submitted by [if different]:** Give the name, address, email and phone number of person or entity submitting the Quarterly Report and administering the Grant.

QUARTERLY REPORT

- **Table of Contents**
- **Modifications to Work Plan or Budget**
Include a description of all modifications to the Work Plan, schedule or budget approved during the reporting period. Also mention in this section modifications to the Work Plan, schedule or budget that are being requested. If you are requesting a formal modification, revisions to the Work Plan, schedule or budget should be attached. Modifications become effective upon EPA approval. Grantees may not change the Work Plan without approval but may reprogram up to 10% of the total funds between approved tasks by notifying the EPA project officer. Note in this section any changes to key personnel or points of contact.

- **Progress Report [organized on a task by task basis, corresponding to the Work Plan]**
Describe the work accomplished during the reporting period by Work Plan task and subtask (if applicable). Include any milestones reached during this quarter. Please segregate those activities that were accomplished with EPA Brownfields funds from activities accomplished from other funding sources. Compare your progress to the project schedule and discuss any discrepancies. Also explain in this section any delays or other problems (if any) encountered during this reporting period, and describe the corrective measures that are planned.

Describe approaches, actions taken and/or lessons you learned that may be helpful to other Grantees implementing similar assessment projects.

Within tasks, highlight the status of the following activities, if applicable:

- **Pre-Assessment Activities.** Describe any pre-assessment activities that occurred during the reporting period. Examples of pre-assessment activities include Quality Assurance (QA) documentation (as required by the grant Terms and Conditions), contracting efforts, technical consultations and Endangered Species Act or National Historic Preservation Act determinations.
- **Assessment Activities.** Describe any assessment activities that occurred during the reporting period. Examples of assessment activities include inventory efforts, field work progress accomplished and consultations with stakeholders.
- **Redevelopment Activities.** Describe any redevelopment activity that occurred during the reporting period. Examples of redevelopment activities include planning, financing acquired or sought, redevelopment plans revised or approved, prospective purchaser agreements negotiated or finalized and non-Brownfields funded activities such as marketing of redeveloped property.
- **Community Involvement.** Describe community involvement accomplishments during the reporting period. Examples of community involvement activities include outreach efforts and outreach materials produced. Include a description of project issues/concerns raised by community members during the reporting period and how they were addressed.
- **Meetings and Travel.** Briefly describe Brownfields-related meetings and travel during the reporting period. When traveling to conferences or workshops, briefly describe the benefits of attending (i.e. resources or technical assistance identified or secured, coordination accomplished and expertise identified).

- **Deliverables/Work Products**

List the deliverables or other work products that were completed during the reporting period and when they were submitted to the EPA Project Officer. These would include those deliverables listed in the Work Plan, as well as copies of press releases, fact sheets, media coverage, journal articles and similar publications. If not already submitted, these deliverables are to be provided as attachments to this report.

- **Activities Anticipated in Next Reporting Period [organized on a task by task basis, corresponding to the Work Plan]**

Briefly describe activities that are being planned for the next reporting period by Work Plan task.

- **Budget Status**

Note that budget reporting in the Quarterly Report does not replace the requirement to submit a Financial Status Report on an annual basis to the Grants Administration Unit.

- **Funds Expended.** Report those funds expended during the quarter and provide a total of the funds expended throughout the life of the grant. Table 1 summarizes the expenses for the reporting period by task; Table 2 summarizes the overall expenses for the grant project.
- **Budget Projection.** Provide an estimate of the time needed and funds to be expended to complete the work included in the Work Plan. Requests for extensions of project period or changes to the budget must be submitted in writing to EPA for approval of a grant modification.

- **Property Profile Form/Form Update**

A completed Property Profile Form is required for each site you are working on with EPA funds and should be submitted at the beginning of the project. As progress is made under the grant (i.e. clean-up completed), a revised Property Profile Form is to be completed as appropriate and submitted with the Quarterly Report. Please note in this section if a revised form is attached and indicate the nature of the changes made.

- **Attachments.** Provide a list of the attachments included with the Quarterly Report. Web site links and/or emailed documents may be acceptable alternatives to hard copies. Please check with the EPA Project Officer to verify if this is an agreeable option. Examples of documents to be attached to the Quarterly Report include documents generated with EPA funds, key documents relating to cleanup activities, press releases and coverage, and other voluntary supplemental information such as pictures.

Table 1 Summary of Quarterly Expenses by Task for Report Period _____

Budget Categories	Task 1 (Include Task 1 Title)	Task 2 (Include Task 2 Title)	Task 3 (Include Task 3 Title)	Task 4 (Include Task 4 Title)	Total Quarterly Expenses
Personnel					
Fringe Benefits					
Travel					
Equipment					
Supplies					
Contractual					
Other					
Total Direct Charges					
Indirect Costs					
Total Current Quarterly Expenses					
Cumulative Overall Project Expenses					

Table 2 Summary of Expenses by Category for Report Period _____

Budget Categories	Budgeted Amount	Previously Expended	Expenses this Quarter	Total Cumulative Expenses	Balance
Personnel					
Fringe Benefits					
Travel					
Equipment					
Supplies					
Contractual					
Other					
Total Direct Charges					
Indirect Costs					
Total Cumulative Expenses					

1.2

Skokomish Tribe Assessment Grant 2003

Funding Type: _____

Address: North 541 Tribal Center Road

Location: Shelton, Washington 98584

Contacts

Name	Position	Phone#	E-mail Address
Ron Figlar-Barnes	Planner	(360) 877-5148	rfiglarb@skokomish.org
Keith Dublanica	NR Director	(360)877-5213	keith@skokomish.org
Carolyn LePage	Comptroller	(360)426-4232 x216	clepage@skokomish.org
Michelle	Temp Position	(360)426-4232	appointment ends 10/31

Documents

Enrollment Electronic Pay System									
Quality Assurance Project Plan									
Health & Safety Plan									
ESA Letter									
MBE/WBE Quarterly Reports									
Quarterly Reports									